



2015 Energy Savings Survey

Key Findings Overview

Survey Purpose

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The 2015 Energy Savings Survey

The 2015 member survey was developed to:

- Gauge member appetite for self-funding energy efficiency and conservation programs
 - Inform a strategy and direction for 2-year interim funding of energy efficiency and conservation programs
 - Solicit member preferences on billing structure options
 - Measure any change in member awareness compared to 2014
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Survey Details

An 18-question survey was released to the OPALCO member base on August 13, 2015, and was closed on September 16, 2015. Members were offered a credit of \$5 on their bill for participating.

The final sample size was 1623 members. The results of this survey presented here are considered highly valid based on size, demographic matching, and collection techniques.

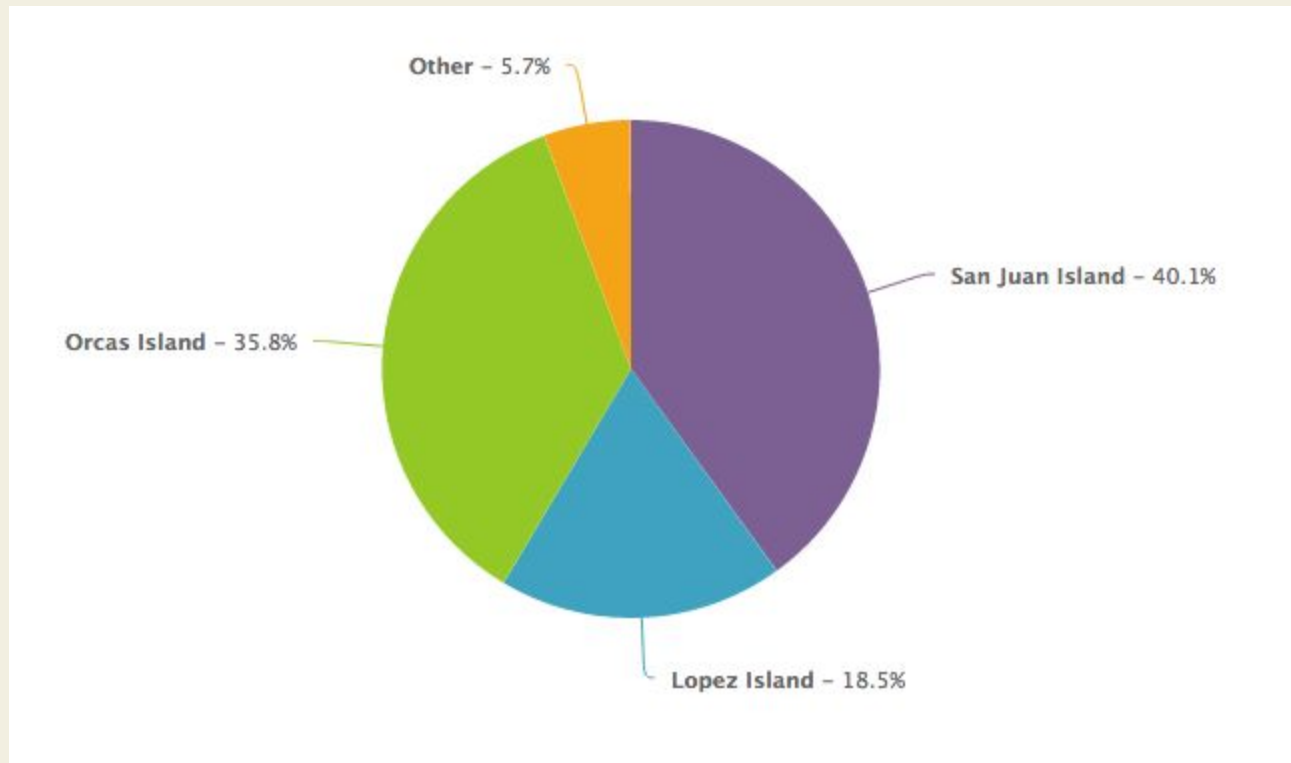
Statistical analysis was conducted using regression analysis, and all open-ended responses were read through individually (almost a thousand)

Key Questions

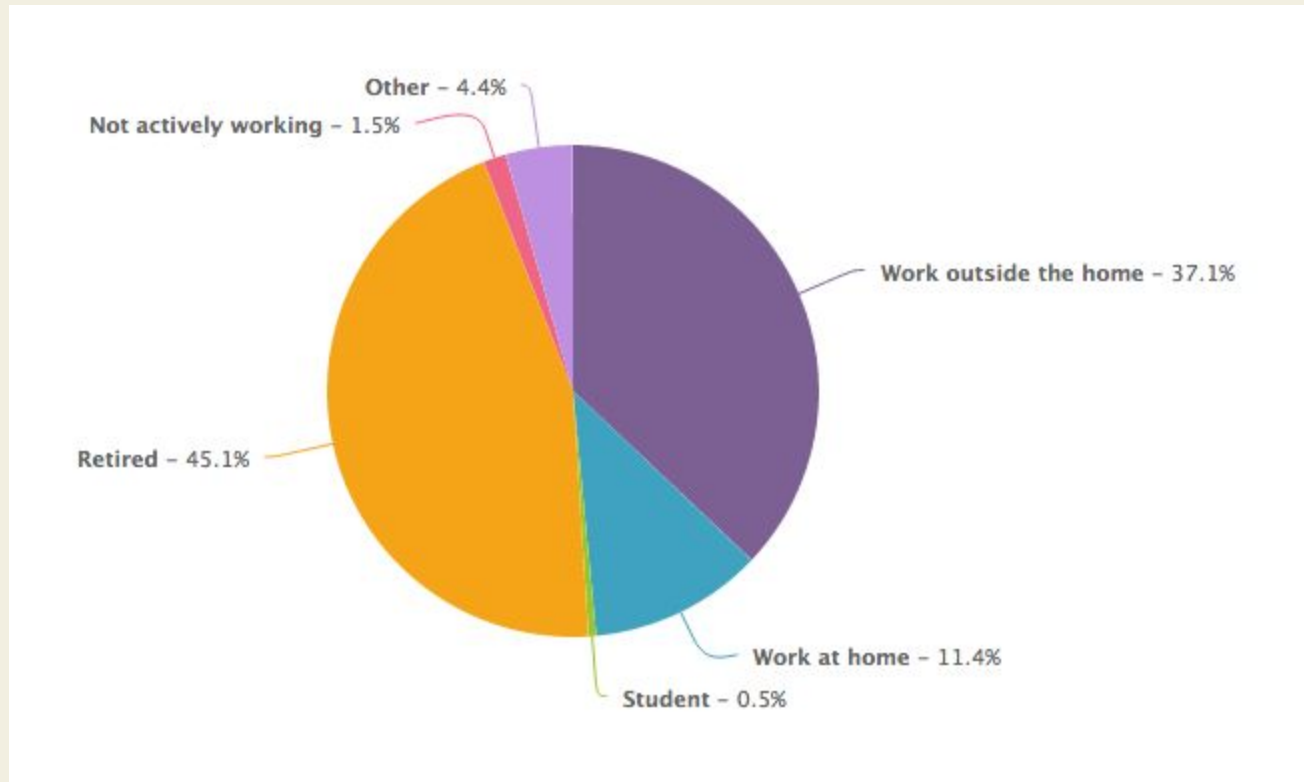
- What should we do with Energy Efficiency & Conservation programs in this 2-year period?
- Is there interest in fuel switching programs like electric vehicles and propane switching?
- What is your preferred billing structure?
- Of the programs that OPALCO funds through rates, what are member priorities?

Demographics

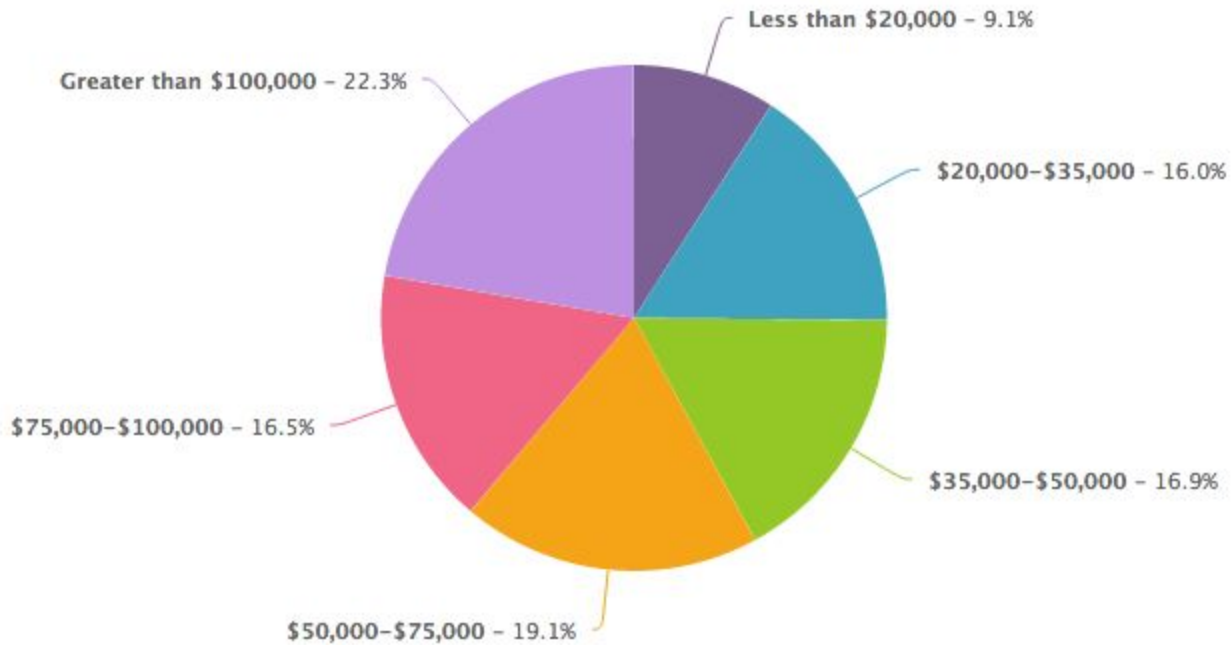
Island You Live On



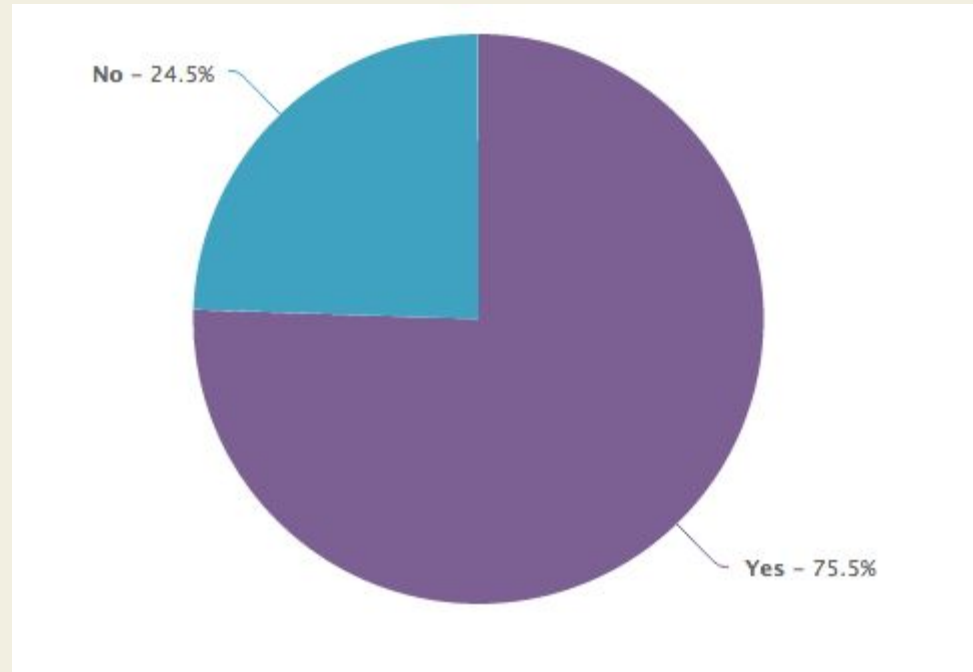
Work Status



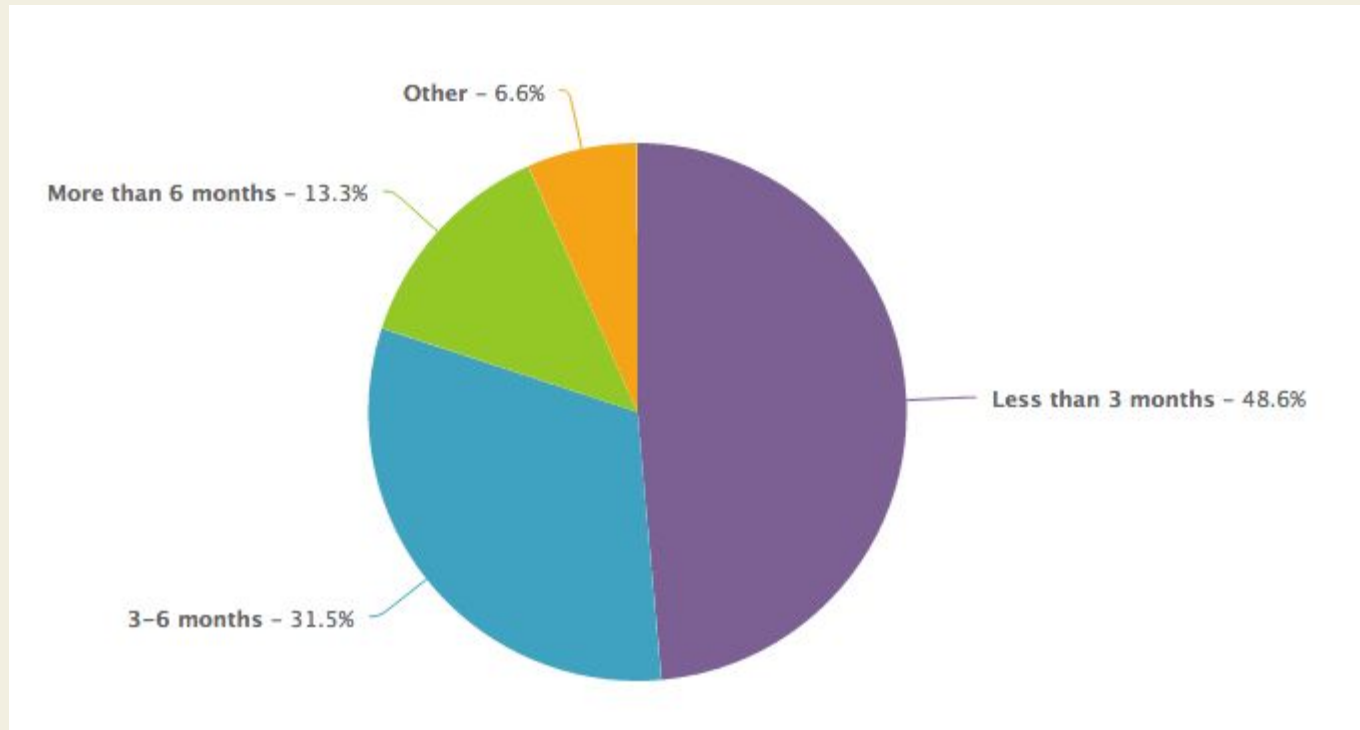
Household Income



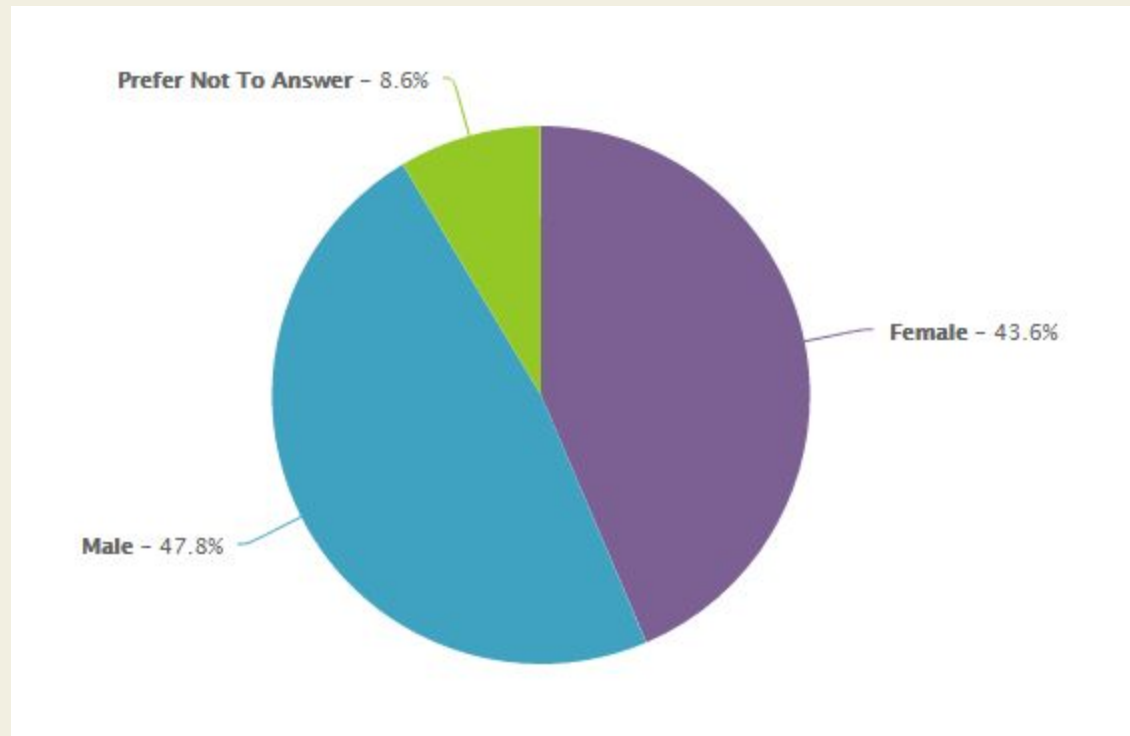
Full-time Resident?



Residency for Part-time Members



Gender

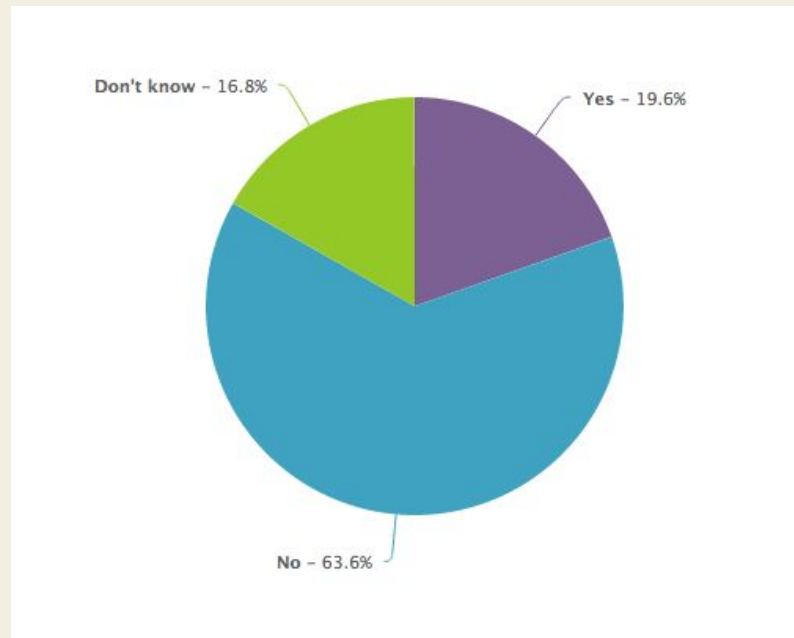


Energy Efficiency & Conservation

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Raise Rates for Rebates

Should OPALCO further increase rates to fund energy efficiency and conservation programs during this interim period of the next two years while BPA rebate funding is not available?



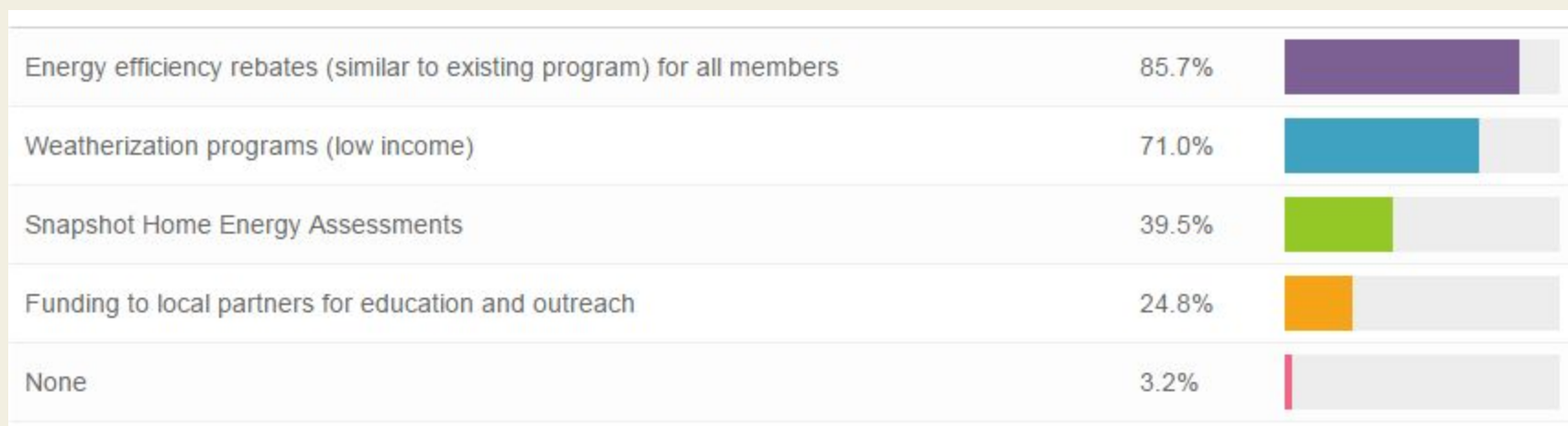
Raise Rates for Rebates - Segments

- In general, the more someone makes, the more they think OPALCO should raise rates to support rebates. Support ranged from those making \$100,000/year (29%) to those making less than \$20,000/year (8%).
- In all segments we looked at there was never more than 30% support for raising rates for rebates

Specific Programs

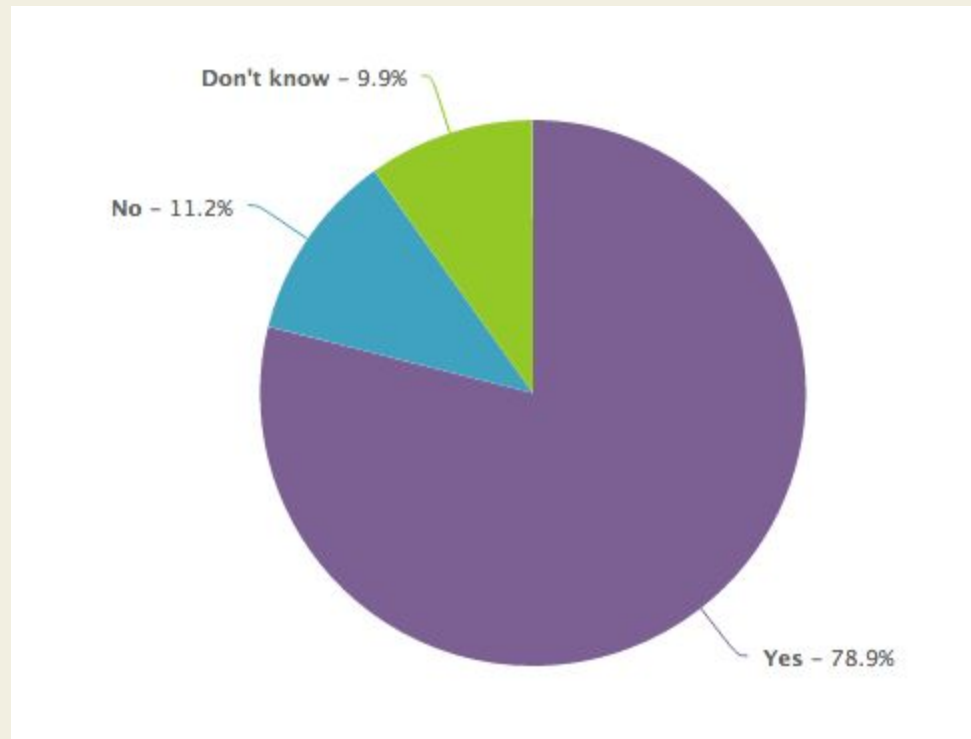
(Of the 19% of members willing to raise rates for rebates)

Which of the following programs (if any) would you want OPALCO to continue by raising rates?



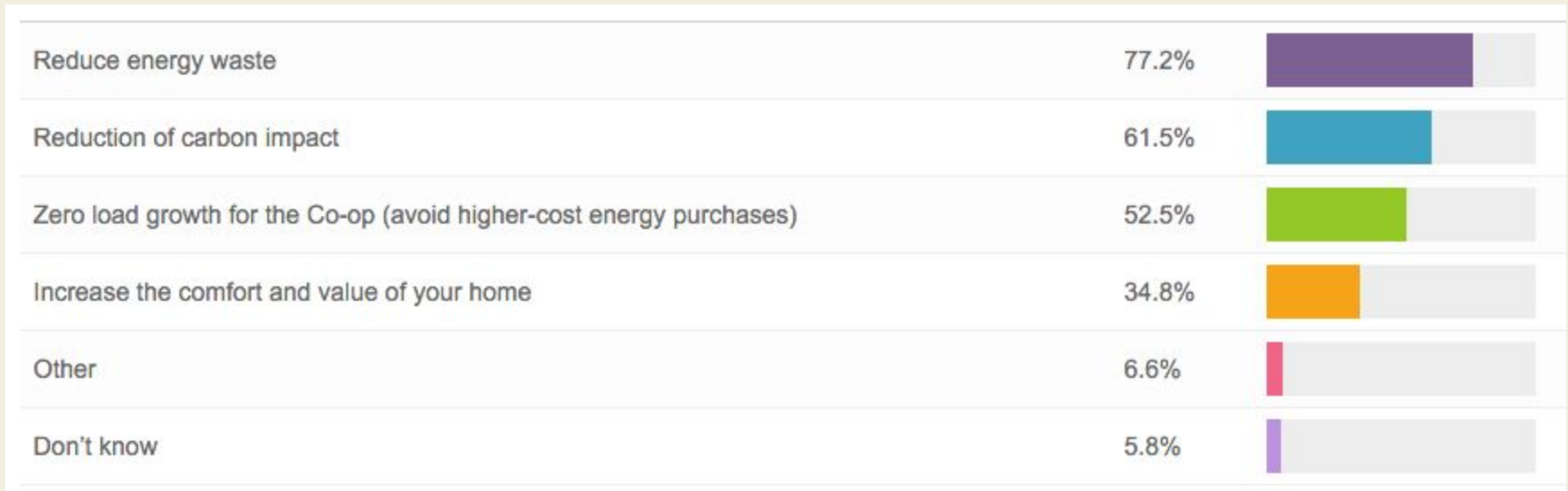
Put EE&C on Hold?

Should OPALCO put these programs on hold during this interim period?



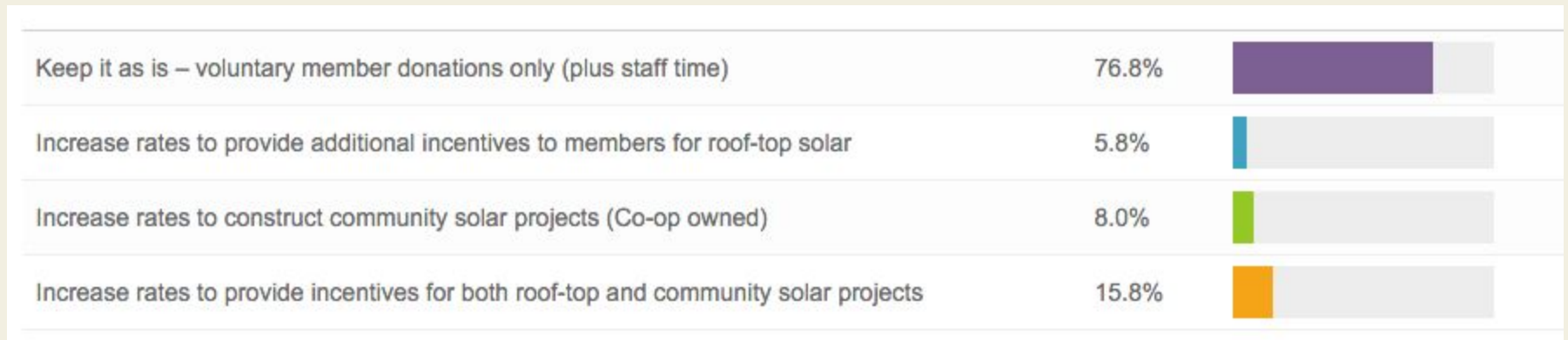
Benefits of Efficiency & Conservation

What do you think the long term benefits of energy efficiency and conservation are?



M.O.R.E.

How should OPALCO support members who generate renewable power?

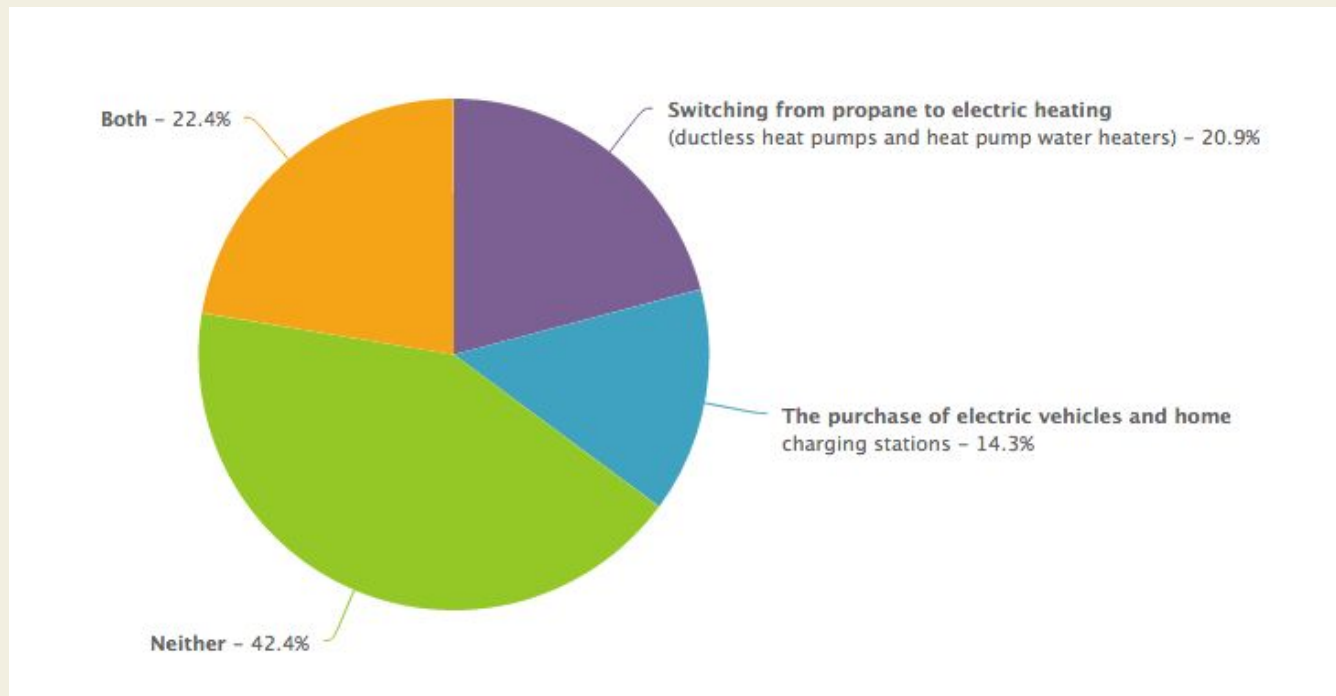


Fuel-Switching Programs

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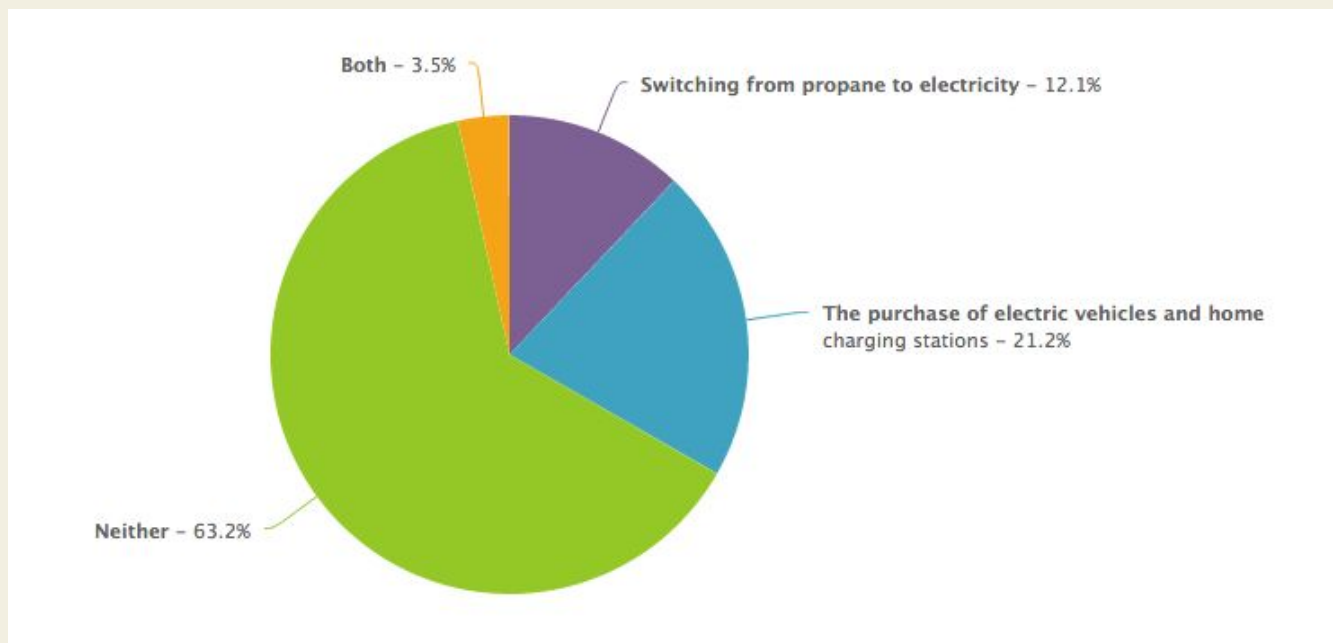
EVs & Propane Switching

Which of the two proposed incentive programs (if any) do you think OPALCO should support?



EVs & Propane Switching

Which incentive program(s) would you personally be most likely to apply for?



Education & Outreach Programs

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Education & Outreach Programs

Have you participated in any of these education and outreach programs?



Education & Outreach Programs

Please rate your experience with these programs

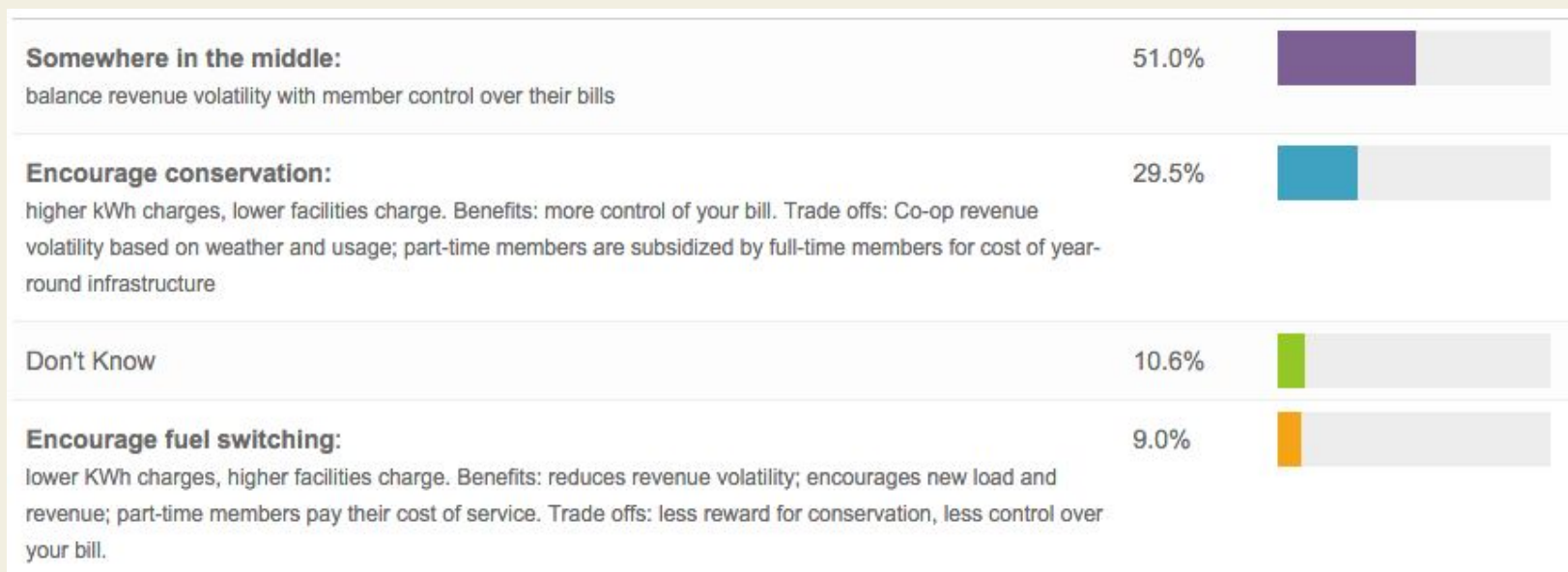
	Very good / good	Neutral	Not good
Energy Fairs	79% (243)	19% (59)	2% (5)
Solar for Schools	81% (94)	19% (22)	0% (0)
Speaker Series	85% (62)	15% (11)	0% (0)
Energy Roundtable	69% (29)	26% (11)	5% (2)

Billing Structure Preferences

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Billing Structure Preferences

In the 2016 budget, the top priority for our rate structure should be



Billing Structure - Segments

Statistically significant differences between key groups

Don't Know

- Part-timers - 12%
- Full-timers - 10%

Support a higher kWh structure (lower facility)

- Men - 31%
- Women - 27%
- Part-timers - 36%
- Full-timers - 28%

Support a lower kWh structure (higher facility)

- Men - 11%
 - Women - 7%
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Program Priorities

Please rank how important the following programs are, considering that they would be funded by increasing rates

	Very Important and Essential	Important	Neutral / Not Important	Do Not Support
Rate Relief Programs for qualified seniors and low-income member households	31% (494)	39% (622)	22% (346)	7% (137)
Energy Efficiency and Conservation rebates	19% (303)	45% (711)	28% (438)	9% (138)
Support of Member Owned Renewable Energy (beyond voluntary donations)	11% (172)	27% (430)	47% (742)	14% (225)

Rate Relief Programs - Segments

Statistically significant differences between key groups

DO NOT support Rate Relief Programs

- Men - 11%
- Women - 4%

DO NOT support Rate Relief Programs

- Residents making over \$100,000/year - 12%
- Overall membership - 7%

DO support Rate Relief Programs

- Renters - 87%
- Owners - 68%

Program Priorities - Segments

Statistically significant differences between key groups

DO NOT support Energy Efficiency & Conservation Rebates

- Men - 12%
- Women - 5%

DO support Energy Efficiency & Conservation Rebates

- Renters - 71%
- Owners - 63%

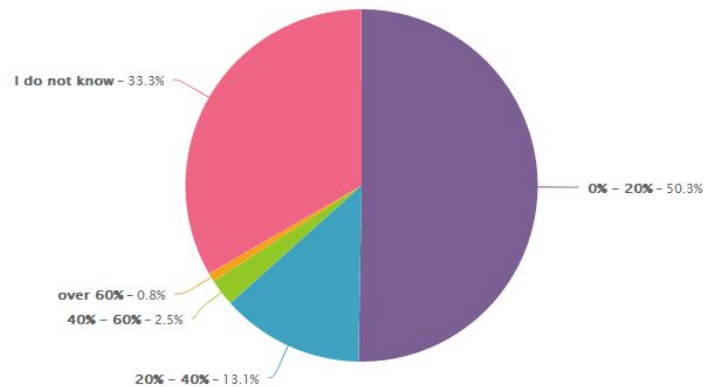
DO NOT support Member Owner Renewable Energy Program

- Men - 17%
- Women - 9%

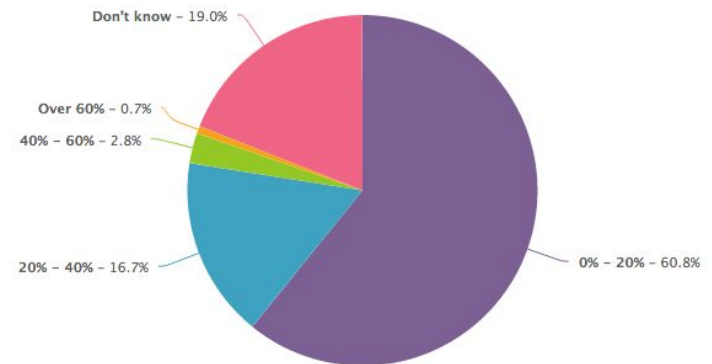
Awareness

Perceived Energy Efficiency Savings

- Members who don't know their potential energy savings have dropped from 33% to 19%
- Members who feel they can make significant efficiency gains grew from 16% to 22%



2014



2015

Differences by Island

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Differences by Island

Statistically significant differences between islands.

Raise Rates for Rebates?

- Lopez - 27%
- San Juan - 18%
- Orcas - 17%

Put Energy Efficiency and Conservation Programs on Hold?

- Lopez - 87%
- San Juan - 76%
- Orcas - 78%

Rate Relief Programs are “Very Important & Essential” or “Important”

- Lopez - 76%
 - San Juan - 70%
 - Orcas - 69%
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Open-ended Member Feedback

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Sample Quotes

“For the next two years, there is no outside funding from BPA for energy efficiency and conservation rebates. How should OPALCO continue to support our mission of environmental stewardship and reward our members' commitment to energy efficiency?”

There were 914 narrative remarks out of 1623 survey respondents (57%). What follows is a characterization of open-ended remarks - all remarks will be included verbatim on the website.

Topics:

Energy Savings - 621

Don't Know - 102

Rates - 69

Broadband - 52

Management - 50

Renewables - 20

Quotes - Energy Savings

621 remarks (67% of all remarks)

Positive: 48% of all energy savings remarks (301)

- “Utilize a middle of the road mindset: balancing fuel switching with conservation.”
- “Raise rates minimally”
- “Continue with voluntary donations and community education.”

Neutral: 17% of all energy savings remarks (212)

- “Educate people on ways to conserve on their own.”
- “I don’t really understand MORE or conservation rebates.”
- “Make clear the cost difference would be from switching propane to electricity.”

Negative: 34% of all energy savings remarks (108)

- “Put the programs on hold”
- “Raising rates is not the answer”
- “Find other sources”

Quotes - Rates

69 remarks (7% of all remarks)

Negative: 80% of all rates remarks (55)

- “Don’t raise rates.”
- “Keep rates as low as possible”

Neutral: 11% of all rates remarks (8)

- “Every connection should share the basic infrastructure cost equally.”
- “Adopt EWUA system – the basic charge should include a basic amount of kWh usage.”

Positive: 9% of all rates remarks (6)

- “Adjust rate structure so as to keep Opalco financials on a sound footing, while continuing to work on and expand broadband initiative.”
- “Variable rate increase, to be determined by current conditions.”
- “Run an efficient operation and charge according to their consumption.”

Quotes - Broadband

52 remarks (6% of all remarks)

Negative: 90% of all broadband remarks (47)

- “Stay out of the Internet business.”
- “Only increase rates for members who will be taking advantage of Internet service.”

Neutral: 6% of all broadband remarks (3)

- “Consider outside support for the Rock Island purchase.”

Positive: 4% of all broadband remarks (2)

- “We would like to have high speed internet provided to our neighborhood.”

Quotes - Management

50 remarks (5% of all remarks)

Negative: 78% of all management remarks (39)

- “Quit over spending.”
- “Reduce management and staff”

Neutral: 16% of all management remarks (8)

- “Tell the story to the membership! Transparency, communications, marketing.”

Positive: 6% of all management remarks (3)

- “You've done a good job so far.”

Quotes - Renewables

20 remarks (2% of all remarks)

Positive: 90% of all renewables remarks (18)

- “Reduced rates for solar projects through raising rates overall.”
- “Plan for renewable energy to be created on the islands.”
- “A solar farm seems like a good idea.”

Neutral: 5% of all renewables remarks (1)

Negative: 5% of all renewables remarks (1)

- “A member's decision to invest in alternative source should be his own and he should not be subsidized by OPALCO.”